



**CITY AND COUNTY OF SAN FRANCISCO
SOLID WASTE MANAGEMENT PROGRAM**

MARKET RESEARCH REPORT

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Prepared for:

City and County of San Francisco
Solid Waste Management Program
Recycling Program
1145 Market Street, suite 401
San Francisco, CA 94103

Prepared by:

Barnes Clarke Inc.
562 Mission Street, suite 201
San Francisco, CA 94105

In conjunction with:

David Binder
San Francisco Poll
800 Church Street, suite 11
San Francisco, CA 94114

Fleischman Field Research
220 Bush Street, suite 1300
San Francisco, CA 94104

DISCLAIMER

The data and information in this report express the conclusions of Barnes Clarke Inc. and are not necessarily those of the City and County of San Francisco's Solid Waste Management Program.

Introduction

The City and County of San Francisco's Recycling Program retained Barnes Clarke Inc. to provide public outreach services to help increase participation in the City's residential solid waste programs.

In order to facilitate a public outreach effort, it was determined that baseline information was needed from San Francisco residents about their existing recycling awareness, attitudes and behavior. A random telephone survey to 600 residents was selected as the research tool. The survey methodology was further modified to obtain a larger subsample from ethnic minority respondents and to more closely examine four San Francisco neighborhoods with low recycling participation rates (Western Addition, lower Mission, Excelsior, Bayview/Hunters Point).

The market research has collected data for the City which examines awareness, attitudes and behavior for the following recycling programs or practices:

- residential recycling options - curbside/apartment,
redemption & drop-off centers
- scavenging
- household hazardous waste program and collection
facility
- source reduction
- school programs
- public information needs.

The market research data shows that San Francisco residents have the ability, interest and willingness to help the City "close the (recycling) loop." To capitalize on the positive, predisposition of its residents to recycling, the City will need to assess and select public outreach activities which are targeted to the specific strategic needs identified in the report.

This document presents the survey results with cross tabulations, and based upon these results makes recommendations as to the strategic direction for the City's residential solid waste programs.

SUMMARY OF RESULTS OF SAN FRANCISCO RECYCLING STUDY

Between September 21 and September 27, 1993, 606 San Francisco residents were interviewed by telephone regarding their recycling habits. The following is a brief summary of the results of this telephone survey.

What Proportion of San Franciscan's Currently Recycle?

If respondents of this survey are answering honestly, about 91% of San Francisco residents are currently recycling at home. Large majorities of all subgroups state they recycle. However, recycling is somewhat less prevalent among African-Americans (75% recycle), those with less than a high school education (77%), and those living in the Bayview (79%), Western Addition (70%), and Downtown (74%) neighborhoods. Also, apartment dwellers are slightly less likely to recycle than those living in houses (88% of those living in apartments recycle, compared to 95% of those living in houses.)

Of those that recycle, 71% state they use curbside recycling and 26% use recycling for apartment buildings. While 98% of those living in houses use curbside recycling, only about 50% of those living in apartments state they use recycling for apartment buildings.

A large majority of those that use curbside recycling do so weekly (84%). People of color and those of lower education levels state lower levels of frequency of recycling.

The majority of apartment recycling users give high ratings: 27% excellent and 56% good. Only 16% rate apartment recycling fair or poor. Those that give low ratings most frequently state it is due to poor access to bins in the buildings, or that the frequency of pick-ups is too low. Older respondents were more likely to ask for more information about apartment recycling.

What is Being Recycled?

Respondents that state they currently recycle most often recycle newspapers (94% of recyclers). The second most frequently mentioned recycled material is glass bottles and jars (89%), followed by aluminum cans (86%), catalogs/magazines (81%), cardboard boxes (76%). Less than three-quarters usually recycle junk mail (70%), tin or steel cans (69%), plastic bottles (68%), and white paper (62%). Other materials mentioned by some respondents include aluminum foil, batteries, phone books, styrofoam, milk cartons and clothing.

In most cases, respondents that have lower levels of education and respondents from ethnic minorities were less likely to recycle most items. Some highlights:

- While 76% of all recyclers state they usually recycle cardboard boxes, but only 53% of those in Bayview and 61% West of Twin Peaks.
- Only 23% of those recyclers in Bayview state they recycle white paper, compared to 61% of all those who currently recycle.

- Renters are less likely to recycle junk mail than are homeowners.
- Older respondents and those living in the Sunset are less likely to recycle plastic bottles than are other respondents.

Plastics was the most frequently mentioned material that respondents named as what they would like to be able to recycle. Other materials include paint, toxics, clothing, motor oil, wood, styrofoam, milk cartons, diapers, colored glass, appliances, yard trimmings, aluminum foil, fluorescent light bulbs and tires.

What are Reasons Why Some Don't Recycle?

A very small base of respondents (60) state they do not recycle. The most common reason given for not recycling is the lack a place to store materials (19%). The second most frequent response was that recycling was "too much work" (17%). Other responses given by less than 15% of the non-recycling respondents include that they don't use enough materials to recycle, that there is no information about how or what to recycle, and that the apartment building does not provide for recycling pick-up. Miscellaneous responses (given by 21%) include difficult pick-up schedules, lack of timely pick-ups, and lack of monetary incentive.

When asked what can be done to convince them to recycle, about 22% requested information on how to recycle, while 11% requested bins. 7% stated that nothing would help (that they are too lazy to recycle) and 34% had no response.

Drop-Off and Redemption Centers

About 14% of respondents state they also use a drop-off center such as the Richmond Environmental Action or the Haight-Ashbury Neighborhood Council Recycling. About 17% say they use redemption or buyback centers such as those found in supermarkets. Those that are more likely to use redemption/buyback centers include people of color (especially Latinos with 31% use of redemption centers). Also, use of redemption/buyback centers increases as education level decreases, implying that socio-economic status is a large factor in the use of redemption centers. The four oversampled neighborhoods, Bayview, the Excelsior, the Mission and the Western Addition, all showed larger levels of patronizing redemption centers than those living in other neighborhoods.

The major reasons given for use of drop-off centers are that they take more kinds of materials and that they pay money for recycling (28% each). About 20% of the 81 people that use the drop-off center state they use drop-off centers when they have too much material to place in the curbside or apartment bins, and about 17% use drop-off centers due to convenience. Relatively few people stated that they use drop-off centers because they support a local organization or to prevent scavenging.

Scavenging

Slightly more than half (54%) of the respondents state that scavenging occurs in their neighborhood. 31% stated scavenging does not occur, while 15% were unsure, with about two-thirds of those reporting scavenging saying it occurs weekly. Respondents in the Mission, Bayview, Richmond and Haight/Castro/Noe neighborhoods were more likely to state scavenging occurs. Those living in the Western Addition, Downtown, Pacific Heights/Marina, and Sunset are less likely to state that scavenging occurs. As might be expected, those using curbside recycling are more likely to notice scavenging than those using apartment recycling.

Also, it appears that those that state scavenging occurs in their neighborhood are more aware of recycling issues in general. For example, 62% of those reading their neighborhood newspapers report scavenging, compared to 46% of those that do not. And 56% of those that currently recycle notice scavenging compared to just 36% of those that do not. Similarly, those that use drop-off centers notice scavenging more than those that do not, implying that scavenging is noticed more by those that pay attention to recycling issues.

However, only about one-third of those that notice scavenging consider it a problem. Older respondents and homeowners are more likely to consider scavenging a problem than younger respondents and renters. Residents of Richmond and Pacific Heights/Marina are slightly more likely to consider scavenging a problem. The most frequently named problem that results from scavenging is that it takes money from a City program. Suggestions for reducing scavenging include placing recycling out immediately before pick-up or at least in the morning of pick-up day, patrolling and ticketing of scavengers, and designing more secure bins.

Respondents that notice scavenging were evenly divided about whether scavenging most frequently occurred from people walking along the streets (38%), people in trucks or cars (30%) or both (31%).

Methods of Disposing of Hazardous Household Waste

Respondents were asked how they typically dispose of hazardous household waste, such as leftover paint, used paint thinner, used motor oil, and leftover pesticides. In all cases, a majority of respondents state they do not use those products. Of those that do use those products, some state they use the Household Hazardous Waste Collection Facility, while others use garbage or trash. Miscellaneous responses include keeping the materials, giving them to neighbors to use, and giving them to landlords to pick-up. Homeowners were more likely to cite the HHWCF for all products.

In total, about 37% of respondents were aware of the Hazardous Household Waste Facility, but only about 14% use it. About 75% of those that are aware of the facility have not used it because they do not generate enough of that sort of waste.

Use of Toxic Products/Buying Recyclable Products

About 53% of respondents state they are buying less toxic products than in the past, and over half state they do so because of wanting to protect the environment. Those that state they are using less toxics are more likely to be between 30 and 49 years of age. Use of less toxics increase with education level.

When asked the importance of buying products that are either made from recyclable materials or can later be recycled themselves, 62% felt it is very important that items contain less toxic or hazardous materials than similar products. 60% felt it very important that the package is made from materials that can be recycled. 50% stated that it is very important that the item is packaged in recycled materials. 44% thought it very important that an item is made from recycled materials, while 36% thought it very important that an item comes in large or bulk sizes rather than single serve portions.

Latino respondents were much more likely to be concerned about toxic or hazardous materials in items (80% felt it very important that an item contain less toxics). Latino respondents were more likely to be concerned about recyclable packages, also.

Schools and Recycling

About 20% of respondents state they currently have school-age children at home (33% of Asian respondents and 30% of Latino respondents). Of these, about half (46%) have seen materials on recycling. but about two-thirds (66%) have heard their children talk about recycling at home.

Information on Recycling

About two of every three respondents state they have all the information they need on recycling. Those that need information are more likely to be under the age of 40, people of color, and those living in the Western Addition. Respondents would like a variety of information, including a list or recyclable items, location of drop-off centers, and information on the Household Hazardous Waste Collection Facility.

Attached to this memo is a graph that shows the percent currently recycling certain materials, as well as a chart that compares weighted and unweighted information on the neighborhood and ethnic composition of respondents. Also, a chart showing neighborhood definitions is attached.

Items That Are Being Recycled

BASE: Those That Currently Recycle

